Medford Public Schools

A caring educational partnership of school, family, and community

Maitenance & Capital Planning Record Writeup

Introduction

The Maintenance and Capital Planning Record is one of the pre-requisite documents required during the application process that the Massachusetts School Building Authority (MSBA) has established for the new grant program for school construction and renovation projects. This report was generated by the MSBA's online Maintenance and Capital Planning System. The MCHSBC reviewed an early draft of the planned responses and authorized the chair and the MPS administration to complete and submit the form at our June 12, 2024 meeting. It contains information entered by representatives on the Medford School Building Committee regarding district maintenance and both capital planning budgets and practices.

The Maintenance and Capital Planning Record was submitted to the MSBA on 7/12/2024.
**Please note that some questions have been edited for clarity and length purposes.*

Section A: Staffing

Question 1: Is school facility maintenance performed by the municipality or the school district?
Answer: A combination of both. Medford Public Schools currently employs 34 custodians, 3 maintenance staff and 1 director of the Buildings and Grounds Department of the schools. Other work, including but not limited to tree pruning or cutting, parking lot striping, pothole repair and large snow removal, is conducted by the Medford Department of Public Works (DPW). The Medford Public Schools utilizes our maintenance staff or contracts with vendors to provide other maintenance.

Question 2: Are vendors used for any aspect of school facility maintenance?
Answer: Please see the bulleted list of vendors we use and how often we use them for our school facility maintenance.

- Asbestos Abatement: Conducted on an as-needed basis by Econ

- Asbestos Testing: Contractors are selected through the state bidding and procurement process and contracted on an as-needed basis.
- Elevators: Inspected and maintained through an annual contract with Atlantic Elevator
- Energy Management: Under the direction of the Medford City Hall Office of Sustainability
- Fire Alarm Systems: Contracted on an annual basis with American Alarm
- HVAC: Contracted on an as-needed basis with Artic Engineering
- Pest Management: Conducted on an as-needed basis by Clancy Pest Control
- Plumbing: Contracted on an as-needed basis with Irvine and Sons

Question 3: Please list the number of full-time equivalent custodial and maintenance staff positions the district has had for each of the last three years.
Answer: Please see the bullet list. These figures have been the same for each of the three years requested.

- 34 Custodians (split between three shifts)
- 3 Maintenance Staff
- 1 Department Director

Question 4: Is there a Director of Facilities for the district?
Answer: Yes.

Question 5: Does the district have defined job descriptions for your custodial and maintenance staff roles?
Answer: Yes. Descriptions for those roles can be found HERE.

Question 6: Is there a system of performance evaluations of the district's custodial and maintenance staff?
Answer: Yes.

Question 7: Is training required and/or provided for the district's custodial and maintenance staff?
Answer: Yes. Starting in 2023, the district established a monthly training meeting with custodial staff members for the following areas:

- Basic Above Floor Cleaning
- Basic Cleaning of Carpeted Surfaces
- Basic Cleaning of Restrooms
- Basic Hard Floor Cleaning
- Chemical Safety
- Cleaning Standards

- OSHA Training
- Proper Snow Removal Techniques
- Proper Storage of Chemicals
- Safety and Security Protocols

Question 8: Is there a written Maintenance Plan for the district that details the minimum custodial and maintenance standards and which governs day-to-day operations? Does the Maintenance Plan include standards and benchmarks for maintenance?
Answer: The written Maintenance Plan for the district can be found HERE. The standards have been established using the United States National Center for Educational Statistics and their work that outlines what constitutes "cleanliness." We are working to achieve Level 3, which is the norm for most school facilities, is acceptable to most stakeholders and does not pose any health issues. Based on this information and our historical routines, we've established a comprehensive plan for the first time for FY25. We will review this guide annually.
We've also begun exploring a partnership with the city's facilities team. Both the School Committee and the City Council voted favorably in June 2024 to accept the provisions of MGL Chapter 71, Section 37M, which would allow the City to share services between municipal departments and the school department. City and school teams will be working collaboratively this summer to identify potential resource sharing in our buildings and grounds area to provide additional support to MPS.

Section B: Planning

Question 1: Is there a preventative or predictive maintenance plan for the district's facilities?
Answer: Yes. The preventative maintenance plan can be found HERE.

Question 2: Does the district have a work order system? Please describe the work order system and how it addresses planned and unplanned maintenance. Please also attach an example of a work order generated by your system.
Answer: Yes. Pages 33-34 of our facilities maintenance plan describe our work order system, which can be found HERE. A user-oriented job aid for submitting a work order, including screenshots of the work order at various stages, can be found HERE.

Section C: Facilities Condition Index

Question 1: Does the district conduct periodic inspections of school facilities to ascertain their conditions? If yes, please describe what is inspected, who conducts the inspections, and how they are documented.
Answer: Yes. We have recently implemented a facilities tracking system, and we are in the process of rolling out the system to all targeted users. As part of the implementation, we will be able to schedule routine inspections and identify projects that require capital planning under our newly documented Capital Improvement Policy that can be found HERE. The system and capital planning process will work together to provide year-round attention to our facility conditions.

Question 2: Does the district have a Facilities Condition Index (FCI)? A FCI keeps track of school systems, identifies major system components and tracks information about those components. If the district does not have a bona fide FCI, does the district have another method for collecting facility data related to condition, cost of maintenance and repairs?
Answer: While the district does not currently have an FCI, in February 2024 we purchased a software package to establish a FCI. We are currently building that system out with the assets of the district in order to properly enter information. Once established, this will allow the district to establish a FCI.

Question 3: Please describe how the district analyzes facility condition information and how that analysis impacts decisions on the budget, capital improvements, staff performance, etc.
Answer: Until FY24, the district approached facility conditions and repairs as needed. The district would divert resources to necessary repairs and respond once assets were broken or damaged. During FY24, we began the shift to recommission our schools with significant HVAC replacement projects at our McGlynn Elementary/Middle and our Andrews Middle School. The estimated cost is $15M, and there is a funding plan in place. Work is expected to be completed by the winter of 2024 or summer of 2025 at the latest. During this process, we will leverage the expertise of our vendors to recommission the Roberts, Brooks, and Missituk to fully understand the budgetary needs for the repairs and work upgrades necessary to return our facilities to full operational readiness.

Question 4: Does the district have an existing protocol for commissioning, recomissioning, or retro-comissioning of any of its facilities or does the district have any plans to perform any commissioning activities (non-MSBA-related)?
Answer: Yes. The district has begun this work, and the City allocated funding in FY25. Work at McGlynn Elementary/Middle and Andrews Middle began in FY24. We are currently

developing a process for completing this work using our vendors who previously completed work at those schools.
Proactive and preventative maintenance is a priority for Mayor Lungo-Koehn and the entire Medford School Committee. Both parties recognize that past practices are not prudent in ensuring maximum operations and lifespan of our schools.

Section D: Environment

Question 1: Does the district routinely monitor air quality and air changes in its facilities? If yes, describe how often air quality is monitored.
Answer: Yes. We analyze air quality annually. We contract as-needed with the Universal Environmental Consultants (UEC) on this work.

Question 2: Does the district implement practices in the EPA's Tools for Schools program?
Answer: Yes. The Medford Public Schools Indoor Air Quality Program was first undertaken at the start of the COVID-19 pandemic. We have continued the measures contained within the Tools for Schools. The district has rolled the facets of the EPA's Tools for Schools into our Emergency Management Preparedness program and monitoring program.
In addition to actively monitoring air quality and other related issues district-wide, we respond to complaints of mold, asbestos, or other issues as they arise. We follow the Problem Solving Checklist to properly address the issues.

Question 3: Does the district have a protocol to eliminate toxic chemicals and use "green" products for cleaning and repairs?
Answer: Yes. Our Green Cleaning Plan for FY25 and beyond can be found HERE.

Question 4: Best practices for building operators typically include regular inspecting, testing, balancing, and cleaning of HVAC components in order to make them operate more efficiently and improve air quality. Does the district have a protocol for doing this?
Answer: Yes. Following the COVID-19 pandemic, significant work was undertaken to bring the district's HVAC systems back up to operations readiness. Due to the age of the systems, there are significant challenges. We clean coils annually, replace filters three times per year and inspect HVAC components.

Question 5: Does the district monitor energy consumption and spending?
Answer: Yes. Through the Medford Office of Sustainability, the district and the city monitor our energy usage. These reports are reviewed quarterly. We are actively working to replace

equipment and fixtures that are not energy-saving. The district is also developing an energy conservation plan to reduce reliance on fossil fuels and reduce the associated costs.

Question 6: Does the district implement energy conservation measures and/or has the district made improvements to its facilities that result in energy savings?
Answer: Yes. Since the fall of 2023, we have replaced 100% of the lights at the Roberts Elementary School, the McGlynn Middle/Elementary Schools, and in substantial areas of Medford High School. Previous lights in these facilities were T12 fluorescent bulbs. We have switched to dimmable LED lights in these spaces that have daylight harvesting capability.

Section E: Budget

Question 1: Does the person in charge of facility maintenance have a role in establishing the maintenance budget?
Answer: Yes. Our annual budgeting process begins with department directors outlining their upcoming spending needs. In FY25, the Medford School Committee aligned budget line items for maintenance with actual spending over past years.

Question 2: Please enter the budget amounts that the district requested from the School Committee for the four fiscal years shown in the table.
Answer: Table A displays information regarding the history of maintenance budget requests made to and allocated by the school committee as well as actual and projected district expenditures. These budget categories mirror those used to report to DESE and can be found below.

DESE Budget Category Codes

these category codes are applicable to all the tables in this document

- 4110: Custodial Services (FY26 & FY27 - 2.5% each year)
- 4120: Heating of Buildings
- 4130: Utility Services
- 4210: Maintenance of Grounds
- 4220: Maintenance of Buildings
- 4225: Building Security (FY26 & FY27 - 2% each year)
- 4230: Maintenance of Equipment
- 4300: Extraordinary Maintenance
- 4400: Networking and Telecommunications
- 4450: Technology Maintenance

Table A: MPS requested maintenance budget for the previous four fiscal years.

FY	4110	4120	4130	4210	4220	4225	4230	4300	4400	4450	Total
FY24	2,516,727	740,000	1,180,000	0	1,303,774	333,183	2,000	0	273,872	0	6,349,556
FY23	2,541,351	705,000	1,145,000	0	1,254,041	305,538	2,000	0	130,835	0	6,083,765
FY22	2,534,402	505,000	1,120,000	0	1,089,044	344,900	2,000	0	158,877	0	5,754,223
FY21	2,534,365	505,000	1,120,000	0	1,050,167	341,645	2,000	0	126,939	0	5,680,116

Question 3: Please enter the maintenance budget amounts that the district was allocated by the School Committee in the four fiscal years shown in the table.
Answer: Table B displays information regarding the history of maintenance budget amounts that were allocated by the School Committee. At no time did the district request a different amount than what was approved by the School Committee.

DESE Budget Category Codes

these category codes are applicable to all the tables in this document

- 4110: Custodial Services (FY26 & FY27 - 2.5% each year)
- 4120: Heating of Buildings
- 4130: Utility Services
- 4210: Maintenance of Grounds
- 4220: Maintenance of Buildings
- 4225: Building Security (FY26 & FY27 - 2% each year)
- 4230: Maintenance of Equipment
- 4300: Extraordinary Maintenance
- 4400: Networking and Telecommunications
- 4450: Technology Maintenance

Table B: MPS allocated maintenance budget for the previous four fiscal years.

FY	4110	4120	4130	4210	4220	4225	4230	4300	4400	4450	Total
FY24	2,516,727	740,000	1,180,000	0	1,303,774	333,183	2,000	0	273,872	0	6,349,556
FY23	2,541,351	705,000	1,145,000	0	1,254,041	305,538	2,000	0	130,835	0	6,083,765
FY22	2,534,402	505,000	1,120,000	0	1,089,044	344,900	2,000	0	158,877	0	5,754,223
FY21	2,534,365	505,000	1,120,000	0	1,050,167	341,645	2,000	0	126,939	0	5,680,116

Question 4: If there is a variance of 20% or greater between the total requested and total allotted amounts in the same year, please provide details on the reason for the difference.

Answer: There is no variance of 20% or greater between the total requested and total allotted amounts for the maintenance budget in the school budget. At no time did the district request a different amount than what was approved by the School Committee.

Question 5: Information on the Expended Budget has been pre-populated based on the information the district provided to DESE. If the pre-populated fields are incorrect, please contact DESE and make a note under the "other detail" question at the bottom of this page.
Answer: This work is currently in process.

Question 6: If there is a variance of 20% or greater between consecutive years in the district's total expended amounts, please provide details on the reason for the difference.
Answer: Due to past experiences where the district managed maintenance on an as-needed basis, the budgeted and actual amounts have not historically aligned. In addition, the district has taken advantage of ESSER and ARPA throughout the MSBA lookback periods to address deferred maintenance on HVAC equipment and begin instituting a preventive maintenance mindset districtwide.
The FY25 budget marks a continued shift away from the prior model of as-needed maintenance and towards a model that prioritizes proactive and preventive maintenance with an alignment of budget line items to reflect actual projected spending needs.
(** this answer was completed assuming there is a 20% variance*)

Question 7: Please fill in the district's projected budget for the next three fiscal years as shown.
Answer: Table C displays information regarding the projected budget for the next three fiscal years.

DESE Budget Category Codes

- 4110: Custodial Services (FY26 & FY27 - 2.5% each year)
- 4120: Heating of Buildings
- 4130: Utility Services
- 4210: Maintenance of Grounds
- 4220: Maintenance of Buildings
- 4225: Building Security (FY26 & FY27 - 2% each year)
- 4230: Maintenance of Equipment
- 4300: Extraordinary Maintenance
- 4400: Networking and Telecommunications
- 4450: Technology Maintenance
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Table C: MPS projected maintenance budget for the next three fiscal years.

FY	4110	4120	4130	4210	4220	4225	4230	4300	4400	4450	Total
FY27	3,573,665	800,384	1,276,288	0	1,555,125	512,178	6,896	900,000	407,706	0	9,032,242
FY26	3,469,578	769,600	1,227,200	0	1,364,199	497,260	6,695	900,000	392,025	0	8,626,557
FY25	3,368,522	740,000	1,180,000	0	1,178,834	482,777	6,500	0	376,947	0	7,333,580

Question 8: What does the district believe the appropriate amount of spending on operations and maintenance should be to allow for the routine maintenance of the district's facilities and to achieve a sound preventative and predictive maintenance program?
Answer: Between $7-$7.5 million per year.

Question 9: Please provide any other comments on your budget history and forecast that would help the MSBA understand variance or the district's budgeting process.
Answer: Due to past experience where the district managed maintenance on an as-needed basis, the budgeted and actual amounts have not historically aligned. The FY25 budget marks a budgeting shift to move away from this model and toward a model that prioritizes proactive and preventative maintenance.
We do note currently separately account for 4210 (included in 4220) or 4300 (included in 4230) or 4450 (included in 4500) and cannot split those expenditures. Our finance team is in the midst of several reclassification efforts and will take these particular categories under advisement during that process.

Question 10: DESE has not provided us with the Total District Expenditure for the most recently completed fiscal year. Please provide us with that information.
Answer: The 2023 total year expenditures were $107,654,649.

Section F: Capital Program

Question 1: Does the district have a practice of capital planning?
Answer: Yes.

Question 2: Does the district have a long-term capital plan of at least five to ten years?
Answer: Yes, there is a five-year long-term capital plan.

Question 3: Is the maintenance staff involved in the planning and design of capital projects?

Answer: Yes. The Director of Buildings and Grounds is a non-voting member of the Medford School Committee's Strategic and Capital Planning Subcommittee. The policy can be found HERE.

Question 4: Does the district have an established line item for a capital reserve account, stabilization fund, or some type of segregated account of local funds reserved to fund capital projects for school facilities?
Answer: Yes. The Medford City Council created two stabilization accounts during FY24 which were officially funded on 6/25/2025. $6 million was placed in a general stabilization account and $5 million into a capital stabilization account. A separate account was established at the same meeting to fund the MBSA Feasibility Study with $3 million.

Question 5: If yes to Question 4, please provide the dollar amount in the account (or amount used from the stabilization account) for each of the last five years.
Answer: Table D provides the five-year history of stabilization accounts reserved to fund capital projects for school facilities.

Table D: 5-year history of MPS stabilization account funds.

Fiscal Year	Dedicated Local Fund Amount	Uses
2024	$11,000,000	Newly established; not yet used for MPS projects
2023	$0	N/A
2022	$0	N/A
2021	$0	N/A
2020	$0	N/A

Section G: Capital Budget History

Question 1: Please list all tax overrides, capital exclusions, and debt exclusions sought by the district and any of its associated municipalities and schools and provided by the MA Department of Revenue. Please provide any comments, corrections or additions to the information listed above.
Answer: No tax overrides, capital exclusions, or debt exclusions were sought by the district and any of its associated municipalities. The City of Medford will vote in November 2024 on a debt exclusion (roughly $2 million per year) to fund a new fire headquarters and two

separate override questions totaling $7.5 million. $7 million will be dedicated to schools and $500,000 will be dedicated to the Department of Public Works.

Question 2: Please describe any capital projects that were deferred due to funding constraints.
Answer: We have deferred capital projects due to funding constraints over the years leading to the pandemic. Deferrals included generators and fixing ventilation and unit heaters. We have restored all systems during the pandemic to meet the requirements of safe schools. Since then, we've begun a districtwide culture shift to prioritize preventative maintenance, and we've worked collaboratively with the city to address deferred repairs. We leveraged ESSER and ARPA funds and are moving forward on a more proactive path with budgeting that reflects actual needs. We are replacing the HVAC systems at our McGlynn Middle/Elementary schools and the Andrews Middle School, scheduled to be completed in FY26. We will be working with our vendors to begin a process of regular recomissioning. The Strategic and Capital Planning Subcommittee has established protocols for proactive capital planning and will ensure capital needs are identified, documented, planned for and executed in a timely fashion.

Section H: Capital Improvement Plan and Budget

Question 1: Please upload a document that lists, by year and item, your anticipated district, municipal, and school capital spending for the next five years.
Answer: The City capital spending plan can be found HERE.

Question 2: Please provide any information the district has about the availability of non-public funds for school facility purposes.
Answer: MPS does have an active facilities rental program; however, historically, the rental fees have only covered salary expenses for staff support of the rentals (custodial, security, etc) and program operations. Beginning in FY25, we will begin to create a chargeback program that will impact rental fees to begin to account for some facility maintenance. We also maintain a separate revolving account for Edgerly Field that holds rental fees for our turf field. This fund also pays for maintenance of the field, which is at the end of its useful life. MPS will leverage this account balance in the coming years (currently $260k) for increased maintenance to extend its useful life.
In FY24, MPs established a McGlynn Playground Renovation Fund to support the renovation and creation of the city's first fully inclusive playground to support the McGlynn Elementary students and the city at large. The current fund contains $9,153.45.

Question 3: Please provide information from the Treasurer, Finance Committee and/or Capital Planning Committee regarding the current outstanding debt and future bonding capacity inside the debt limit for the municipality.
Answer: Per Chief Financial Officer of Medford Bob Dickinson on June 25, 2024, Medford has $58,325,000 outstanding inside debt as of June 30, 2023. The debt limit is 5% of the City's equalized value, which is $14,910,626,740 as of the 2024 recap. As a result, we can borrow up to $745,531,337 and still be inside the debt limit.

**This Document was finalized on Sept. 18, 2024*